Exercise 1:

Scenario: You are an Evaluator and need to complete an Annual Performance Plan on your employee.

Step	Task	Step Instructions	Role	Notes
	Launch the Annual Performance Plan task	• Reference the PM Admin Training Annual Performance Planning Exercise Instructions handout	Evaluator	In Production you will receive an email notification anytime a step is assigned to you in the Performance module Add goals by using the library or create manually Tasks should follow the SMART criteria Total Goal weight should equal 100%

Exercise 2:

Scenario: As the Agency Performance Administrator, you want to report the status of those that have completed an annual performance plan.

Step	Task	Step Instructions	Role	Notes
	Run a **Performance Review Step Status Report** to see employees who have completed the annual performance plan	• From the MyPURPOSE home screen, hover over **Reports** • Select **Standard Reports** • Select **Performance** • Select **Performance Review Step Status Report** • Select User Criteria as **Organization** by selecting the icon • Select the **icon** • Select the icon beside **Your Organization** • Select **Done** • The Advance Filters allow you to choose a performance review task • Select the beside **Performance Review Task** • Select the **Annual Performance Planning** task in the list • Note that all review steps are checked. This means that the report will display all review steps for each employee within the organizational unit • Select **Export to Excel** to view the report	PM Admin	The Step Status report is a custom report that will also show you the next line supervisor The report status will show as Complete In Progress Not Started Past Due Reopened You can filter and sort this information to share this with your field contacts Step by step instructions for all reports are included in the PM Admin reporting manual

Exercise 3:

Scenario: As the Agency Performance Administrator, you want to audit the goal tasks of several employees.

Step	Task	Step Instructions	Role	Notes
	Run a **Goal Task Summary Report** to audit an employee's goal tasks on the annual performance plan	• From the MyPURPOSE home screen, hover over **Reports** • Select **Standard Reports** • Select **Performance** • Select **Goal Task Summary Report** • The Date Criteria should be defaulted to the current performance year • Select User Criteria as **Organization** by selecting the icon • Select the **icon** • Select the icon beside **Your Organization** • Select **Done** • The Goal Type will default to All • Note that the report will display all goal tasks for each employee within the organizational unit • Select **Export to Excel** to view the report	PM Admin	The goals details report will allow you to view an individual employees goals, tasks and goal percentages assigned The bulk status report allows you to view an individual employee or group of employees' completed performance reviews Step by step instructions for all reports are included in the PM Admin reporting manual

Exercise 4:

Scenario: As the Agency Performance Administrator, provide the number of employees who declined to sign an annual performance plan.

Step	Task	Step Instructions	Role	Notes
	Practice running a **Declined to Sign Report** to see employees who have **declined to sign** the annual performance plan	• From the MyPURPOSE home screen, hover over **Reports** • Select **Custom Reports** • Select the **Declined to Sign** report under the Title heading. It will highlight. • Select the drop down arrow under the **Actions** heading. • Select **Refresh** • Once you select Refresh, it will display that it is "processing". This means that your report is preparing and **will populate the current date when complete** • When the report is ready, select the drop down arrow then select **Excel** to view	PM Admin	Once you export the report to Excel you can filter and sort the data You can filter and sort this information to share this with your field contacts Step by step instructions for all reports are included in the PM Admin reporting manual